

# Collaborative Approach: The Self-Study Process And Writing The Report

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## ABSTRACT

*When conducting a self-study within an educational organization, there should be a collaborative effort by members of the organization regarding the process and writing the report. In order to create a culture of self-study and to make the process clear to all stakeholders (faculty, staff, students leaders, administrators and support partners), there should be frequency in evaluation and assessing the progress of the organization. The self-study should be conducted for “self” and to prepare for the accreditation association’s visit every five years generally. The major purpose of the self-study is not only to comply with wishes of the accreditation association’s standards, but to comprehensively evaluate how the stakeholders or educators are doing within the organization. The self-study should show how the educational organization has evolved and improved its services and commitment over the past several years by addressing strengths and areas recommended for improvement. In preparation for articulation for the growth of the organization, each department within the organization should have in place a common formatted template for writing up the self-study report based on the standards set by the accrediting agency. The standards stated/written by the accrediting agency will help to guide the writing process. In essence, the template will help the writing groups to know who, what, when, where, and why to address needed information. These group writers should know how to address information needed in a precise manner and to the point when writing the report. The writing groups should use information, materials and resources that the educational organization already has on hand to write the report. The available and use of data within the organization should be collected and analyzed by groups and committees of individuals, with expertise, to be shared with others and write the self-study report. All written information for the self-study report should be supported by evidence of physical and electronic documents for review by stakeholders and the visiting accreditation association team. When writing the self-study report in preparation for the accreditation association visit, this is the general format to follow: introduction, degree programs and objectives, general education, resources/materials, outcome assessment, specific recommendation for improvement, a comprehensive look at graduate programs, summary evaluation and optional information about success stories i.e. using photos or graphics.*

**Keywords:** Collaboration; Self-Study; Educational Organization; Accreditation

## INTRODUCTION

When conducting the self-study for an educational organization and writing the report there should be a collaborative effort by various committees and group members based on standards set by the accreditation association. The report should describe the mission of the organization and the overall goals, objectives and outstanding qualities of each department. The overall mission of each department should serve or fit within the mission of the educational organization. Beyond the mission, the self-study and writing the report should include information about objective and degree programs, general education, resources/materials, outcome assessment, prior report information, graduate degree programs, writing the report, first draft, organizing the report, the writing process, draft report to visiting chairperson, certification of eligibility, submitting final report, executive summary and a living document.

**OVERALL MISSION**

The mission statement should be clearly written and should address central values of the organization and/or institution. The balance between the undergraduate and graduate instructional program, emphasis should be placed on teaching, research/scholarly work and services. The mission statement should continue to drive assessment and the broad-based strategic planning at the institution.

**OBJECTIVES BY DEGREE PROGRAMS**

The writing for the report should briefly describe each degree program and its specific objectives. The objectives should be meaningful, measurable and obtainable. Information about the degree programs should be communicated to the public and it should be clearly indicated how information is published and communicated to students and others i.e. websites, online, emails, brochures, open house and handouts.

In each degree program, the curriculum should be described. It should be stated how the curriculum is created, evaluated and changed or modified with justification. The curriculum committee should be composed of faculty within the degree program or others with the expertise in curriculum writing. The curriculum writers should emphasize how the design of the degree or program exhibits coherence, breath and dept of study by students. The curriculum writers should show the effectiveness of sequencing courses, relevancy of courses today in society, synthesis of learning and the assessment of learning outcomes that are measurable.

Appropriate and adequate resources are essential within the educational organization such as an up-to-date library with journals, periodicals, and other materials should give students and faculty more access to comprehensive views of literature for study and research. The resources provided by the library should be an integrated part of the curriculum for degree programs.

The need to authenticate information for the self-study should be documented materials in the form of qualitative and quantitative data. This data should give the number of majors within a department and assess the efficacy of the advisement process used with students. In the written report, the group writers should cite trends in the number and the academic quality of students attracted to enrolling in various degree programs. Another important factor is to state clearly how students are scheduled for courses for optimal learning and access. For example, are students in a traditional classroom or are many of the courses available online plus how frequently are same courses offered during the year for the convenience of the students.

**GENERAL EDUCATION**

The self-study written report should describe how each department serves non-major students and contribute to the growth of undergraduate programs through marketing and enrollment each semester. What is the transitional relationship of undergraduate programs to students who have completed two year college programs who have expressed an interest in attending a four year educational program? If the data is available, state how many students the institution serves in this capacity from two year colleges who would now like to complete their education at a four year college. Students from two year colleges who now in the four year college should also be assessed by their progress and learning in general education programs. Useful assessments could be in the form of the number of students enrolled each semester, courses required to take, instructional assessment (formative and summative) and the number of students meeting successful experiences in various courses.

**RESOURCES AND MATERIALS**

In order to meet the needs of students, staff and faculty, it is important to have appropriate and adequate resources and materials. The self-study committee should assess the adequacy and quality of resources available for each department. The goals of each department need to be met through adequate faculty and staffing, the availability of proper working/modern-day equipment, appropriate physical facilities space and use, library holdings and connection with the university system and other services used by the department. A needs assessment should be conducted at least twice a semester for materials, supplies, references, equipment and other resources.

It is important to utilize human resources from the community for general and specific support at the university or organization. Supporting individuals from the community could give the self-study group another perspective and would be able to help set the framework for future support and collaborations. Successful self-study groups within the university or organization encourage their community members and supporters to be a part of the self-study process and valuing what these members have to say. Sometimes community members have an interest in the self-study process, but do not have the time to spend on the time consuming process. The community members or supporters can always help the university or organization to create new friends and new opportunities for collaboration (Karajan, 2004).

In their own way, these are some organizations and agencies that could continue to render support to the university before, during and after the self-study visit by the assessment team: Chamber of Commerce, Alumni/Parent Organizations, Tourism/Marketing groups, Technology Companies, Social Services, Neighborhood organizations, Libraries, Healthcare organizations, Transportation providers, Law enforcement, Fraternities, Sororities and other Service organizations and Philanthropic organizations. This list could go on and on and of course, there can never too much positive support to help keep the university or organization's posture of assessment readiness.

### **OUTCOME ASSESSMENT**

At this point when writing the Self-Study report, groups at the organization/institution need to come together and give input summarizing the outcomes in the assessment plan for various degree programs. Again, all writings should be precise and clear. The writing for this section could be one to two page typed. Some reports are double spaced and some are single spaced. Most reports reviewed in recently years have been typed in a single space format. The accrediting agency will give specifics in a detail manner as to how the report should be typed. In this section of the report, a brief background of the process used to create the assessment plan gives an update of the progress of each department in the process. It should be clear how the self-study assessment report activities have lead to the improvement of teaching and learning at the institution/university. It should be clearly stated if there have been changes or expected changes in the curriculum and what factors influenced these changes. For any self-study assessment, the writing team/groups should be honest about the university or organization's strengths and areas needing improvement. It is important to avoid writing reports to impress the visiting accreditation team, but to articulate ways to see progress and the need for improvement in self-study for the organization or institution. The writing team should attach documents to support the written report where applicable. In essence, the written self-study report should be evidence-driven by making needed documents available to the assessment visiting team to review if and when requested. Showing the quality of students' work/projects is another important inclusionary part of the self-study report. Sharing copies of students' examinations and the use of surveys and questionnaire that solicited students' input about faculty instruction and management plus services at the university is another important part of the self-study report. All self-study reports are written several times in a draft and should be read each time by committee members for modification where needed (Paquette, 2004)

### **STATUS OF SPECIFIC RECOMMENDATIONS FROM A PRIOR ACCREDITATION REPORT**

Based on the prior visit from the accreditation team, the Self-Study group should be able to show what has been done to address suggestions for improvement. A written report and a visual view of what has been improved or corrected should be evident. For example, if a physical facility needed improvement in the area of repair there could be a photo then and now exhibits of work on file so that the visiting team could physically and visually make the inspection at the site.

Because of the availability of technology systems to accommodate assessment standards, most universities and organizations are creating and reserving an electronic library to store various self-study reports and documents. Many major pertinent documents are being scanned into an appropriate navigational database system for the self-study report today. The advantage of the electronic version of the report can be conveniently updated for faculty, staff, administrators to review and this same report, if requested, could be sent quickly to the accreditation team before and after the visit (COA, 2010)

## **GRADUATE PROGRAMS**

The Self-Study group should be prepared to show documentation about specific graduate courses offered and why. The number of students enrolled since the last self-study report, number of faculty and staff and their specific credentials to qualify to teach or hold a managerial position in the graduate program, samples of students' research and accomplishments in the graduate program are all important to be included in the report. The accreditation visiting team may wish to see narrative information along with graphics, figures and tables plus the team may interview faculty, staff and students about their views based on standards and their general impression about the university's instructional and managerial services.

## **GRADUATE DEGREE PROGRAMS**

The graduate degree programs should also address accreditation questions through the current standards that are given. Graduate faculty/staff across the university programs should also continue to gather information that is needed for the accrediting agency. Graduate information gathered should be precise in definition to address the standards set by the accrediting agency. All degree programs in the graduate program should be part of the evaluation in preparation for the accrediting agency's visit. There should be an internal time-line for each department to collect and review information for clarity. Committee members should have specific roles and responsibilities to play so that the process is fair when communicating information about degree requirements and expectations in the graduate degree programs. As a collaborative approach and benefit, all committee members during the self-study would learn more about their own department and other departments at the institution.

## **WRITING THE REPORT**

When writing the report for undergraduate and graduate level programs and expectations at the university, the writing groups should avoid institutional politics and side/personal agendas. All writings should be honest and professionally put forth in the best manner. Several documents should be collected from groups and reviewed for their clarity and continuity. The major writing team of individuals should review the working groups' reports to ensure that all appropriate topics have been addressed adequately. If the writing group which is called the steering committee finds insufficient topics covered based on the compliance standards set forth by the Commission, information should be given back to the working group to address specific needs by a said date.

## **FIRST DRAFT OF THE SELF-STUDY REPORT**

When the Writing or Steering Committee begins writing the draft of the self-study report, the writing should be concise, readable and substantial draft document for review by the campus community. Generally the final report should not be more than 200 double spaced and 100 single spaced pagers. The writing committee must remember that the accrediting agency is always looking for substance and quality of the report and not necessary quantity.

## **ORGANIZING THE SELF-STUDY REPORT**

There should be a template established for the working group to follow when writing their reports. The reports are electronically submitted to the official Steering Committee for a write up from the working groups. The visiting team uses the template in preparing its report or questions to the institution. It is clear that are many self-study models available for reporting information to the visiting team; however, it is important to use the model that can be formatted easily to the standards that will be tracked by the accrediting agency. Some of the same standards may be recorded by various working groups in different settings, but it is still essential that the standards are addressed adequately by each group even when there is an overlapping of information. The written report may detail information about the institution's particular culture, structure, core values, processes or current issues or concerns.

The self-study report should be organized in the order of the standards set by the accrediting agency. This order of standards addressed or written by the Steering Committee helps the visiting team to easily follow

information according to standards set forth in an orderly manner. Therefore, it is important for the Steering Committee writing the report to show how the evidence and analysis represented in each section relate to each of the standards, because the visiting team must determine if the institution meets all the standards.

## **THE WRITING PROCESS**

The Steering Committee needs to ensure that the right individuals are doing the final writing of the report. The Self-Study Report should be concise and coherent. The entire Self-Study Report should be written with consistency as follows: style, format and structure. Editing the report for correct grammar and the transition of thoughts should be smoothly articulated.

There should be a schedule of time for writing the report. Specific information should be ready for review and revision of the final draft timely. If there are certain design elements needed for the report such as graphics and tables sizing, make sure that the calculations are correctly computed. If the Steering Committee does not have the best expertise in designing the needed information, make sure that individuals with such expertise are brought in to assist with this part of the task. All designing and printing needed for the Self-Study Report should be established ahead of time before the final self-study written report has been completed the working groups.

## **DRAFT REPORT TO CHAIRPERSON**

The chairperson of the visiting team should receive a copy of the self-study report in its finest form prior to the visit. The chairperson will let the institution know what is expected regarding the report in advance. Usually the chairperson would like to see the report four months prior to the visit to the institution. If the report differs from the earlier design, information should be explained to the chairperson. The chairperson will read the report with the visiting team in mind and the chairperson may make recommended modifications to the report to be more useful to the team ahead of the visit. After the report has been revised as recommended by the visiting chairperson, the report should be endorsed by the institution's governing body or administration (Middaugh, 2004)

## **CERTIFICATION OF ELIGIBILITY**

When the self-study report is submitted to the visiting team, the sending institution also certifies that it has met all eligibility requirements set forth by the accrediting agency i.e. Middle States Commission on Higher Education. The Commission will send to the institution the Certification Statement form which must be attached to the Executive Summary of the final self-study report. The Steering Committee should re-read carefully what the expectations are regarding what papers should be sent along with the report to the soon to be visiting team. All sending information should be precise and accurate and looking professionally prepared in the same format addressing each standard.

## **SUBMITTING THE FINAL REPORT**

The institution should submit the final self-study report no later than six months prior to the visit scheduled by the evaluation team. The institution should send to the accrediting agency one copy of each of the following items:

- Send Self-Study Report with Eligibility Certification Statement attached to the Executive Summary
- Include the most recent profile of the institution
- Submit supporting documents essential to clarifying all aspects of the self-study report i.e.
- Institutional handbooks, catalogs, current organizational charts
- Send a copy of the financial plan for the academic year and the succeeding years covered by the plan
- Send actual enrollment figures for undergraduate and graduate students for the past three years
- Articulate with justification the projected enrollment for the period covered by the institution's financial plan

Additionally, the institute should send to the Commission two sets of the two most recent audited financial statements and management letters. Sometimes, more financial documents could be requested by larger institutions that have a corporation structure for profit institutions that are not operated as a state institution (MSCHE, 2007).

### **SUMMARY EVALUATION BASED ON STANDARDS**

The Self-Study group should state what significant changes have taken place in each department since the last visit. Again, state any changes that have been made in reference to the recommendations given by the accreditation team in response to the last accreditation report based on standards. The Self-Study group or committee should specify why certain changes were made and what have lead to the changes or action. Clearly state the strengths of various departments and how does the department contribute to the strengths of the overall university or organization. Indicate too in an honest manner, what are the challenges faces the department or university in reference to resources and materials. The written report should state future goals and the rationale for these goals. The goals should be articulate in short-terms and long-terms. The steering committees and working groups should always remember to view the self-study as a positive way of looking at self and making definitive ways to improve the institution or organization.

### **CONTINUE USING THIS LIVING DOCUMENT**

The written self-study report is a living document. Therefore, after the visiting team completes the evaluation of the institution, working groups should continue to keep evidence of documentation for the growth and development of the institution. The self-study report process represents a significant commitment in time by knowing about the institutional resources, how these resources are used and how candidates or students are progressing at the institution. By conducting the self-study, it gives the faculty, staff, student leaders and administrators time to create and maintain a culture of self-study and campus wide accountability.

The institution may continue use the self-study report in a positive manner as follows:

- Maintaining the existence of the steering committees, working groups and training new individuals to be on various self-study committee
- Continuing to create time-lines with assignments pertinent to accomplishing the recommending suggestions stated by the Commission for institutional improvement
- Incorporating the recommendations into the specific charges to already established committee members
- Utilizing institutional research staff/faculty to support, assist, monitor and track the implementation efforts by various working groups
- Securing the expertise of outside consultants to assist with the development of improvement strategies for the entire institution

By activating ongoing all of the above items, the steering committees and working groups would help to create a culture of self-study, articulate, create and view the whole concept of the self-study report as a living document and its value to the institution/organization and broader communities.

In the summary portion of the written report could include some optional information such as success stories related joint faculty and student recognized research projects, student scholarships, foundation gifts, accepted research papers for publication at the regional, national and international level.

### **AUTHOR INFORMATION**

**Dr. Ann Toler Hilliard** teaches in the Department of Educational Studies and Leadership at Bowie State University, U.S.A. The researcher coordinates activities that provide professional experiences for those individuals who are seeking the opportunity to serve as a school administrator. She has held leadership positions as a principal, college program director, academic achievement specialist in Maryland and in the District of Columbia. Her experiences as a leader in the area of administration extend from elementary school through graduate school.

Dr. Hilliard served as director and principal investigator for Bowie's Scholars program in the University College of Excellence. Other positions held included being the assistant to the vice-president for academic affairs and deputy director for the Science Engineering and Mathematics program for a Model Institution of Excellence. Her professional experiences extend to the U.S. Bureau of the Census by analyzing national population and economic status data and served as a consultant for Maryland, U.S. Virgin Islands and Seoul, Korea schools, and post-doctorate program at Harvard University.

Dr. Hilliard has presented at local, national and international conferences on topics related to leadership, instruction, curriculum development, formative assessment and best practices for recruitment and sustaining staff. The researcher has published a number of articles in national and international journals.

Education:

Ed.D., George Washington University

Consulting Certificate, Harvard University

Advanced Professional Certificate, Maryland State Department of Education

M.S., Johns Hopkins University

M.A.T., Trinity University

B.S., Elizabeth City State University

Memberships:

Educational Consultants Institute

Clute Institute for Academic Research

American Association of University Women

Association for Supervision and Curriculum Development

Institute for Academic and Social Development Board

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National Staff Development Council

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**NOTES**